

# In Search of a Future Strategy for Market Research Services: Clients' Views on Market Research Suppliers

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The market research environment is transforming rapidly and research suppliers may not be keeping up with changing research client needs. This paper examines research client perceptions of current research supplier performance and future competencies. The key findings are that research suppliers need to move their staffing profiles beyond technical expertise in conducting research (generating outputs) to functional expertise in understanding research outcomes within internal and external organizational contexts. The transition from *data collector* to *expert advisor* may involve a new business model and new pricing strategies based on intellectual expertise rather than margins on data collection services.

## Introduction

The market research (MR) industry faces new challenges in meeting clients' expectations within a dynamic environment. Much debate at industry conferences concerns the diminished importance of market research in client organizations. Other contentious issues facing the MR industry include the lack of experience of research clients, the decline of the centralized market research unit in organizations, and competition for strategic advice from other professional service industries. However, despite a degree of market research industry angst, there has been a lack of formal research into these issues. Ironically, market researchers are not good at researching client perceptions of their performance or client perceptions of their future role.

The rapidly changing research industry environment suggests that a study of client perceptions of current and future research suppliers' performance and competencies is overdue. Some factors that are dramatically impacting the way research suppliers operate include introduction of customer management systems by organizations (Nancarrow *et al.* 2003), the changing role of the Internet in consumer and business research (Ngai 2003) and challenges to the contribution made by marketing to organizational performance.

In this paper we examine a number of emerging market research supplier issues from a specialist research client perspective. Future trends and issues facing research clients are also highlighted.

## *The role of market research information in business strategy*

Business in the 21st century is increasingly characterized by the need to collect, manage and use information effectively (Menon & Varadarajan 1992; Williams 2003). The focus appears to have changed from the acquisition of data as a basic knowledge resource (Glazer 1991; Sinkula 1994) to the implementation of sophisticated technology-based knowledge systems (Chan 2005; Chung *et al.* 2005). This view would suggest that there may be a shift in focus from the use of external research suppliers to the more effective use of internal technologies to provide management decision support. These technologies include Internet, customer relationship management and data mining systems. Companies are using these technologies to support business strategy. Research has also shown differences in how new technologies were used according to business strategies such as differentiation or cost leadership. (Valos *et al.* 2004). Further information provided by customer management systems and customer analytic software may complement, corroborate (Malhotra & Peterson 2001) or substitute for information provided by traditional market research in informing strategy. Baker and Mouncey (2003, p. 417) raise the question "...whether the pursuit of relationship marketing, perhaps through CRM initiatives, demands any changes in how market research is undertaken or delivered." Customer management systems allow behavioural data to provide clearer insight into areas such as loyalty.

Market orientation literature (Deshpandé & Farley 1998; Greenley 1995; Jaworski & Kohli 1993; Kohli & Jaworski 1990; Lear 1963; Narver & Slater 1990; Narver *et al.* 1993; Wrenn 1989) provides evidence that an organization that understands its primary customer segments and has superior customer focus should deliver better business performance and strategic direction. Kohli and Jaworski (1990, p.4) argued that “the starting point of a market orientation is market intelligence”. They highlighted the need for effective dissemination of information within the organization. Thus, the role of market research suppliers within marketing orientation warrants consideration.

### **Changes in the nature of market research services required**

The vagaries of collecting adequate data are increasing (Tourangeau 2004). Further, Buttle (2004) provides a list of information needs which shows that organizations are actively seeking responses from consumers about “everything”. In addition, sales lead generation and telemarketing are often indistinguishable from legitimate market research, from the consumers’ perspective. This is causing increasing numbers of consumers to simply opt out of research participation. The decline in response rates, the extreme unevenness of survey participation (Bickart & Schmittlein 1999) and increasing privacy laws limit firms’ abilities to contract data collection services externally (Nowak & Phelps 1997). This has led to change in focus from collecting data to using data which is readily available (Liu & Shih 2005; Mosley 2005).

Malhotra and Peterson (2001) posit this shift to mean that researchers in the 21st century will become providers of professional consultancy services rather than simply data collection agencies. However, while the requirement for intellectual and strategic expertise may be welcomed by most research agencies, one issue is that research clients have difficulty in evaluating a high credence service (Zeithaml 1981). While the AMA Research Council (2002) would like clients to be experts in research, this is not feasible when research clients expect the expertise to be on the supplier side (Callahan & Cassar 1995; Grapentine 2002).

For market research suppliers making this transition from information collector to expert advisor, there is still a need to ensure dissemination of both information and associated advice throughout the client organization (Glazer 1991; Jaworski & Kohli 1993; Maltz *et al.* 1999; Moorman *et al.* 1993; Moorman *et al.* 1992).

However, it may not be enough to disseminate and apply knowledge within an organization; Deshpandé and Zaltman

(1987) and Baker and Sinkula (2002) suggest that it is *breakthrough knowledge* which provides competitive advantage. These approaches merely add to the weight of data available. If market research suppliers are to change from simply *adding to* the knowledge base to *adding value from* the knowledge base, the competency of *intuiting* based on existing data will become an important competency (Thompson & Walsham 2004). In this sense, intuiting involves both a good understanding of the market and creative insight into the real meaning of the data. However, intuiting only becomes possible when the axioms on which decision-making are based are already created—that is, when previous research consistently returns the same answer (Sinkula 1994).

For marketing research suppliers, there are several implications from the preceding discussion on the role of research. Firstly, much research is confirmatory in nature and generates few surprises (Bednall *et al.* 2005). This produces a potential conflict for research suppliers, since the continued collection of data and associated costs may be questioned and this may devalue the relationship with the research agency. Secondly, the requirement for breakthrough knowledge means that market research suppliers may need a new or improved set of managerial competencies. Consulting firms have assumed a role at a higher level than market researchers. They have done this by having all-around business competencies and been more savvy in terms of finance, acquisitions, process reengineering and tactical implementation. Because of this expertise, senior managers can identify with them. Consulting firms have been seen as providing more doable big-picture ideas both internally and externally. Consulting firms are also seen as being less about incremental ideas and issues and more associated with breakthrough ideas. In this way, they are *leveragers* of insights obtained from data collected.

### **The changing nature of the research supplier-client relationship**

As the application of knowledge to business practice becomes the focus of management decision-making, the nature of the supplier-client relationship inevitably changes. In order to develop higher-order outcomes (adding value) from research data, the supplier must become more engaged in the client organization. However, to provide the greatest added value, suppliers must do some seemingly obvious yet not commonly done tasks. They must look at past primary and secondary research, which may result in insights into the current project. Further, suppliers should examine the competitive environment, as issues relevant to the effectiveness of the research recommendations and resultant marketing actions will become apparent.

Arnett *et al.* (2000) proposed a typology of information usage. This typology ranges from usage of information which is instrumental in strategic decision-making to information usage which is designed to make decision-makers feel good (affective usage). Instrumental information usage requires an in-depth knowledge of the organization. This is only available to the research supplier when they form a partnership with the client. The formation of business partnerships is fraught with implications of accountability and corporate governance. Thus, while clearly beneficial (Haytko 2004), true partnerships are difficult to establish and maintain. Furthermore, while large-scale organizations have the specialist resources available for collection, dissemination and application of knowledge, for smaller organizations, the supplier is often the expert (Raymond *et al.* 2001). The MR supplier is therefore required to be both the expert and the independent provider of marketing knowledge (Debruyne 2000).

#### ***So what do clients want from market research suppliers?***

It becomes apparent from previous studies into MR quality and information application that clients are competent at expressing their needs. Previous research suggests clients:

- expect rigorous marketing research and often get descriptive market research instead (Neal 2002);
- want real-time decision-making capabilities (Colgate 2000);
- want complete information and relative certainty in decision-making (van Birgelen *et al.* 2000);
- want the *value add*—they want the results to be interesting and to present new insights (Smith & Fletcher 2004; Smith 2003);
- want information that is accessible and usable at the individual level (Celuch *et al.* 2000);
- want information that allows them to solve problems (Berthon *et al.* 2001)—they want results to be future-oriented;
- want to trust the information that they use (Moorman *et al.* 1993); and
- need more than passive provision of information; they want research to be proactive in sensing changes in the marketplace (Thygesen & McGowan 2002).

Baker and Mouncey (2003) and Simmons and Lovejoy (2003) have focused on the changing environment of market research services and suggested guidelines for improved practice. This research takes the view that definite change is required if researcher suppliers are to avoid marginalization. Further, they must improve understanding of organizations by working with internal teams and utilizing resources such

as CRM by becoming *boundary spanners* (Baker and Mouncey 2003).

#### **Study Objectives**

In summary, while we appear to know theoretically what research clients want, there is a gap between their requirements and what research suppliers provide them. This is the great danger facing the market research industry. Will research suppliers be able to maintain relevance in a research environment which is transforming rapidly?

In order to assist suppliers of research services in planning and delivering their offerings to clients, this study set out to examine perceptions of research clients regarding:

- current MR supplier performance;
- nature of the research client-supplier relationship; and
- identification of future research client needs.

#### **Methodology**

The locus of the study was Australia. Like Canada, Australia is a medium-sized developed western economy with a high standard of living and fast adopters of technologies. Based on recent estimates (Australian Bureau of Statistics (ABS) 2003), MR in Australia comprises around 2% of the world market in research services (Honomichl 2003). In dollar terms, the industry was estimated to have revenue of \$480M in 2001/2002 (ABS 2003). The large industry players are mostly multinational in nature and include companies such as Millward Brown, ACNielsen and Research International. Given that these supplier companies are found in many countries and many of the client companies in this study (IBM, Ford, etc.) are international in scope, the study results should be indicative of MR issues in other medium-sized western economies.

The research was conducted in three phases. In the first phase, 16 depth interviews were held with senior marketers and research managers in Australia and the United States about MR performance and its value to client organizations. The second stage was a study of research clients in client firms. The third research phase provided the data for this paper. The sample frame of clients was compiled from all industry sectors (including nonprofits) known to have one or more people dedicated to the market research function. The survey was mailed and/or emailed to these potential respondents.

In total, 80 questionnaires were received (representing a 20% response rate from individuals and 32% of organizations). While this might at first appear a small sample, it represents

a significant proportion of the population of organizations with specialist research clients in Australia. It is estimated that approximately 250 organizations have specialist research clients. The sample was representative in terms of large, medium and small client firms. The sample responses, although slightly biased towards the more *expert assessments* of the professional research clients in their dedicated roles in large firms, should therefore be representative of MR activity in Australia.

## Outcomes of the Research

### **The changing role of MR**

On the client side, nothing better illustrates the changing role of market research than the position descriptions of MR specialists in the client firms. The traditional job title, “Manager—Market Research” was in a minority. MR management titles included Managers of the following: Brands, Consumer Insights, Business Process Development, Marketing, Strategic Development, Consumer Science and Insight, Group Marketing and Strategic Insights (see Table 1 below). Some respondents objected to the term “buyer” to describe their role. They believed the role was much broader and influential than “buyers of research”, which is the reason we use the term *client* in this paper. Writers such as Valentine (2002) and Baker and Mouncey (2003) have identified two predominant roles: one having an *information provision* emphasis, and the other having an emphasis on *strategic use of customer intelligence (including MR)* and creativity.

### **Performance and type of relationship between clients and MR suppliers**

Table 2 shows clients generally believe that they have a strong relationship with their supplier/s, and that the importance of the suppliers to the organization will continue in the fu-

ture. However, there was a strong indication that MR suppliers need a better understanding of their industry sector and individual organizational needs.

The findings showed 52% definitely agreed with the observation that few MR companies supply strategic advice. In addition, 35% of research clients agreed with the view that research suppliers do not have management consultancy expertise.

In summary, although MR suppliers provide an important service, only relatively few perform it well. Clients are generally unconvinced about their standards of supplier service, reporting and expertise. There is a view that suppliers do not understand client needs adequately.

### **The contribution of MR to the client**

In terms of the specific contribution MR makes to client organizations, Table 3 shows the most commonly agreed views to be “MR helps the client understand the dynamics of the market” and “MR helps marketers in their roles at the business unit level”. Unfortunately, it also appears that market research is less effective in influencing top management and providing key management performance indicators. There is also little support for the idea that MR findings can be readily integrated with other existing customer or competitor data.

While clients mostly see the outcome of market research produced by suppliers very positively, they do not generally see MR supplier organizations positively. Research clients are critical of supplier understanding and capabilities as shown in Table 2. This implies that respondents see themselves as compensating for supplier deficiencies and ensuring MR efforts are effective. This suggests an area research suppliers need to address.

**Table 1: Examples of job titles and management unit titles**

Example Job Titles	Example Management Unit Titles
Business Intelligence and Market Research Manager	Customer Competition Insights
General Manager Strategic Marketing	Customer Information and Retention
Manager—Business Process Development	Market Knowledge—Strategy
Manager Strategic Development and Community Engagement	Marketing Strategy, Research and Planning
Strategic Insights Manager	Business Development Department
Strategic Marketing Manager	Business Intelligence Group
	Business Process Development Unit
	Client Relationship Management
	Commercial Development

**Table 2: Relationship with MR suppliers**

	Mean Agree Score	Std. Deviation	% Disagreeing (1 or 2)	% Agreeing (6 or 7)
<i>Relationship Issues—Current and Future</i>				
We have a strong relationship with our market research supplier/s	5.49	1.37	5%	57%
Market research companies need to understand our specific industry better	5.22	1.52	7%	48%
Market research companies do not understand business needs	4.27	1.60	14%	29%
There is little differentiation between market research suppliers in terms of services offered	3.34	1.64	33%	11%
Market research suppliers will become less important to our organization in the future	2.58	1.35	56%	12%
<i>Expertise/Competencies</i>				
Few market research companies provide strategic advice	5.06	1.50	8%	52%
Market research companies do not have management consultancy expertise	4.74	1.53	8%	35%
Most market research suppliers understand how research fits into our overall information requirements	4.38	2.79	18%	17%
Market research suppliers need to use more sophisticated data analysis approaches	4.19	1.57	16%	22%
Most market research companies are only useful for basic information gathering	3.82	1.49	24%	15%
<i>Service Performance</i>				
Most market research companies offer excellent service	4.19	1.35	12%	16%
Market research companies generally provide high-quality written reports	4.06	1.60	20%	22%
<i>Other issues</i>				
Smaller market research companies provide higher quality research	4.32	1.41	12%	23%
Our market research supplier/s provide/s only a limited amount of our information needs	4.29	1.51	18%	21%

Scale: 1 = totally disagree, 7 = totally agree. In this study a top 2 box and bottom 2 box approach was used to highlight the more definite attitudes of respondents.

**Table 3: Contribution of MR to the client**

	Mean Agree Score	Std. Deviation	% Disagreeing (rating 1 or 2)	% Agreeing (rating 6 or 7)
<i>Contribution to Marketing Decision-making</i>				
Helped the marketers in the business unit	5.73	1.14	5%	75%
Been used to assist marketing decision-making	5.62	1.16	4%	67%
Helped management understand the dynamics of the marketplace	5.61	1.26	4%	66%
Provided the main "voice of the customer" in the business unit	5.49	1.23	1%	56%
Mainly been used to increase understanding of marketing issues	5.03	1.37	5%	40%
<i>Level of Impact</i>				
Made a major contribution to the marketing strategies of the business unit	5.37	1.35	6%	63%
Led to an improved implementation of new products or services	5.36	1.23	5%	50%
Normally led to concrete actions being taken	5.21	1.29	5%	48%
Profoundly shaped marketing policies	5.01	1.23	5%	40%
Produced information whose value far outweighs its cost	5.00	1.50	6%	42%
Had a major influence on our top management	4.63	1.49	11%	30%
Been used to provide key measures of managers' performance	3.52	1.93	40%	18%
<i>Risk Reduction</i>				
Mainly been used to confirm understanding of issues	4.75	1.30	3%	35%
Helped cover backsides when managers need to make risky marketing decisions	3.63	1.71	33%	16%
<i>Reporting</i>				
Produced reports that are easy for staff to understand	5.03	1.39	8%	44%
Produced information that's easy to integrate with our customer data	4.21	1.46	14%	19%
Produced information that is easy to integrate with our competitor data	4.10	1.54	15%	21%

Scale: 1 = totally disagree, 7 = totally agree.

**What clients want now and in the future from MR**

Table 4 shows responses regarding five-year future trends in MR. The results confirm the importance of the market research contribution to the organization and the key role of suppliers. Clients put strong emphasis on the ability to disseminate research internally. They also place great importance on utilizing new internal intelligence-gathering approaches to data mining, customer management systems and customer data warehouses. These approaches may limit the role of market research suppliers and may help clients reduce MR costs. Possibly, MR suppliers might be better off changing roles from data collectors to internal intelligence advisors and/or internal management decision-making facilitators. Supporting this view is the expectation that MR suppliers will provide high-level strategic advice as support for other marketing consultants, assuming this role is low.

As far as future methodological developments are concerned, data fusion is seen as a means of integrating findings from primary data, customer management systems and data mining. In addition, respondents see Internet-based research and panels as growing significantly in importance in the future.

The Internet will collect information, gather competitive intelligence and facilitate internal dissemination of market research which will aid business strategy development.

**Discussion**

The variety and evolution of job description titles for managers commissioning market research indicates the changing role of market research within organizations. These titles indicate the importance of market information to the strategic direction of client organizations. It is clear that respondents' roles are more than narrowly research-oriented or gatekeepers of information flows. This complicates the task for suppliers of research services who need to redefine their roles from narrow data collectors to providers of *breakthrough insights* who add value to their client's role (Crosby *et al.* 2002). It would seem relatively straightforward to provide standard market research outputs, but how does one provide consumer insight? For this transition to occur, research suppliers need to change their staffing profiles from technical experts in conducting research (generating outputs) to functional expertise in understanding research outcomes within an industry sector and individual organizational context.

**Table 4: Importance of research issues in future**

Issues ordered in terms of mean current importance.

	Current Importance	Current Importance	Future Importance		
	% Very High and High	Mean	Mean	Gap	Significance T-test p value
Involving external expertise for market research projects	65%	2.25	2.12	0.13	0.01
The effective dissemination of market research information throughout the organization	58%	2.37	1.77	0.60	0.00
Market research contribution to the development of business strategy	55%	2.42	1.87	0.55	0.00
Requiring high-level strategic advice and recommendations from external research suppliers	45%	2.70	2.50	0.20	0.00
The use of data mining technology/expertise in-house	47%	2.73	2.00	0.73	0.00
Reducing the cost of market research activities	38%	2.74	2.57	0.17	0.01
Use of customer warehouses/databases	43%	2.84	2.07	0.77	0.00
Using full-service market research suppliers	37%	3.00	2.86	0.14	0.01
Gathering competitive intelligence	29%	3.03	2.32	0.71	0.00
Use of CRM (customer relationship management) system	29%	3.04	2.14	0.89	0.00
Use of the Internet to collect information	21%	3.28	2.38	0.89	0.00
Use of syndicated data	18%	3.51	3.32	0.20	0.01
Use of respondent panels to collect market research information	23%	3.53	2.96	0.57	0.00
Market research being used as 'insurance' for marketplace failure	13%	3.59	3.50	0.09	0.21
Researching overseas markets	16%	3.82	3.41	0.41	0.00
Using strategic marketing consultants such as McKinseys to guide market research decision-making	15%	3.95	3.84	0.11	0.09
Decentralizing the market research buying function	7%	4.22	4.26	-0.03	0.44

Scale: 1 = very high importance and 7 = nil importance.

While clients generally agree that MR contributes to their business, the low ratings they give for suppliers' service provision and technical quality (e.g., written reports) highlight areas for research supplier improvement. Unfortunately, the findings show research clients are not persuaded that their research suppliers understand their business needs, and are not persuaded that they have strategic management consulting skills. It is evident that suppliers need to develop expertise in internal organizational areas of customer management systems and data mining. MR agencies need to have a very good understanding of the client's external needs as well as internal needs and constraints if they are to be effective. These results present serious challenges for research suppliers if they are to move beyond service provision in terms of data collection.

Another dimension of particular concern, in an era where marketing accountability is paramount, is the perception that MR does not increase productivity or help with the measuring of performance. This is very likely associated with MR suppliers' traditional role of adding weight to the body of knowledge instead of adding value through *breakthrough insight*. The findings show that marketing research does not appear to have a role in the boardroom (Ambler 2000). This was shown by only 30% of clients definitely agreeing that MR has an influence with top management. The market research industry is still struggling and weighed down with the perception that it provides value with data but not necessarily value with instrumental knowledge. This might also be an issue of trust as suggested by Moorman *et al.* (1992; 1993).

Questions about the future importance of research for clients shows that MR suppliers will need to have greater levels of organizational contextual understanding. The future requirement is that research suppliers also need greater technical expertise in linking information from data warehouses and knowledge management systems. Another future requirement is that MR suppliers more fully participate in the dissemination of knowledge throughout client organizations. This raises the question of MR suppliers having sufficient skills in such areas. This issue is clearly yet to be resolved (Von Arx 1986).

Finally, the transition from *data collector* to *expert advisor* may involve a new business model for research suppliers who have yet to evolve pricing strategies based on intellectual expertise rather than margins for data collection services. This new business model needs to consider that the collection of data will become increasingly automated, and that the Internet and client information technology systems will become a key part of information collection, dissemination and usage. Thus, the new research supplier will be required to provide *breakthrough knowledge* that demonstrably improves client performance. This can only be delivered with a new skill set.

### Limitations and Directions for Future Research

Firstly, the study participants may not be fully representative of all research clients. The respondents were dedicated clients in specialist roles, which tend to occur in larger organizations. Further, it may be that respondents are biased towards overstating the contribution of market research.

Future studies into research suppliers should focus on the interaction between external research and the usage of knowledge generated from within the internal systems of the client organization. For example, 70% of participants believed that market research has little to do with top management decisions. This suggests it would be worthwhile to investigate the depth and level of usage of knowledge and to establish how successful organizations manage the knowledge process. Another aspect that might be explored is the relationship between formal market research and informal sources of knowledge (Wright & Ashill 1998), which must still be a major resource for management decision-making. Establishing how and why informal knowledge systems work might be instrumental in determining ROI on formal research investment. These research suggestions are made in the interests of allowing the MR industry to move forward confidently in turbulent times. If these issues are not acted on, there is a danger that research suppliers will miss the opportunity to play a more strategic role—and ultimately fail their clients.

Finally, the new skill set required for a new business model will have implications for the design of academic marketing programs and industry short courses. Future research in this area will require multidisciplinary research teams to blend disciplines such as human resources, IT and marketing.

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